PURCHASING USER MANUAL

CREATING AND USING A REQUISITION TEMPLATE

INTRODUCTION

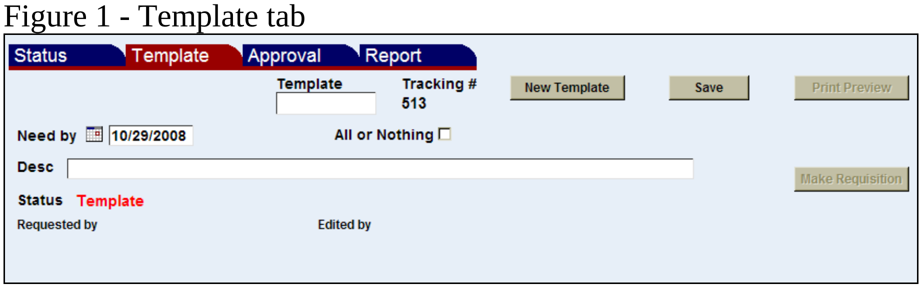
A requisition template can be created in order to reuse the line items and fiscal coding on future requisitions. A new requisition made from a template can then be added to or modified as needed to complete for purchasing.

A template can be created either from an existing requisition or requisition that you have just saved, or a template can be created on its own to be used later for a new requisition. The important distinction is that a requisition saved as a template must first be saved as a requisition; therefore you will have both a requisition and a template. Be aware of this if you intend to create only a template.

TO CREATE ONLY A TEMPLATE

1. Click the **Status** tab.
2. Check the **Template** check box.
3. Click **Find**.
4. Click the **Template** tab.

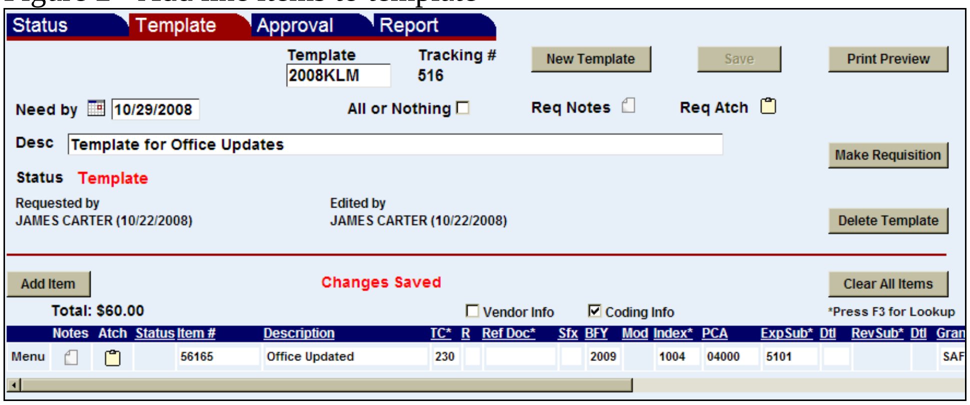
Figure 1 - Template tab



5. Enter a name for the template in the **Template** field.
6. If desired, select a **Need By** date.
7. Enter a **Description**.
8. Click **Save**. NOTE: A department, if used by your agency, is not required (or available) when creating a “stand alone” template. The department will be selected when the requisition is made from the template.

9. Click **Add Item**. Add the **Description**, **Qty**, **Price**, etc as would for a requisition. Add as many line items as needed. See the Creating a Requisition document for details.
10. If desired, click **Vendor Info** to add a vendor name and address as you would for a requisition.
11. If desired, click **Coding Info** to add fiscal coding as you would a requisition.
12. Click **Save** to save the template.

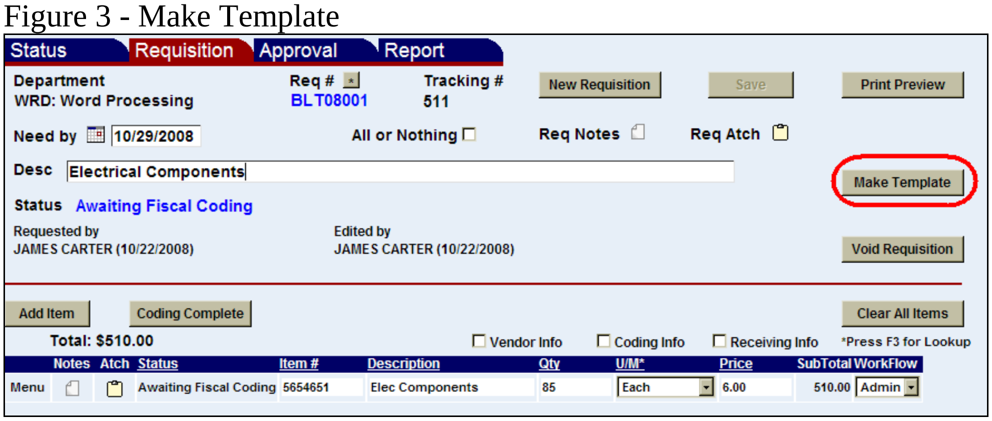
Figure 2 - Add line items to template



TO CREATE A TEMPLATE FROM A REQUISITION

1. Click the **Requisition** tab.
2. Enter the Requisition as you normally would. See the Creating a Requisition document for details. (You can complete as much of the requisition as desired, including vendor information and coding information.)
3. When finished with the requisition, click **Make Template**.

Figure 3 - Make Template



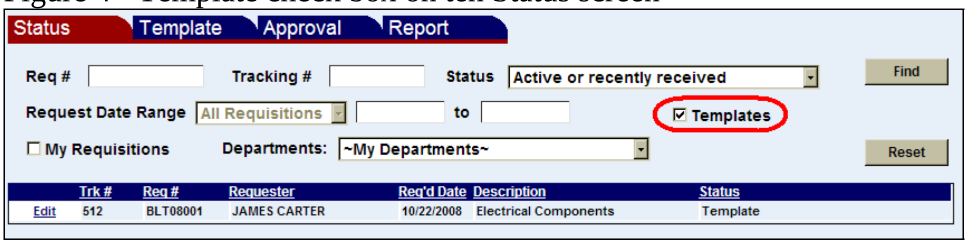
4. The **Requisitions** tab changes to the **Template** tab. You can make more changes or additions to the template as needed. For example, you may want to change the **Description** since it is probably something unique to the requisition that you have saved. Otherwise your template will be saved with the same description as the requisition.

5. Click **Save** to save the template.
6. To finish with the requisition, select it from the **Status** screen.

TO USE A TEMPLATE TO MAKE A REQUISITION

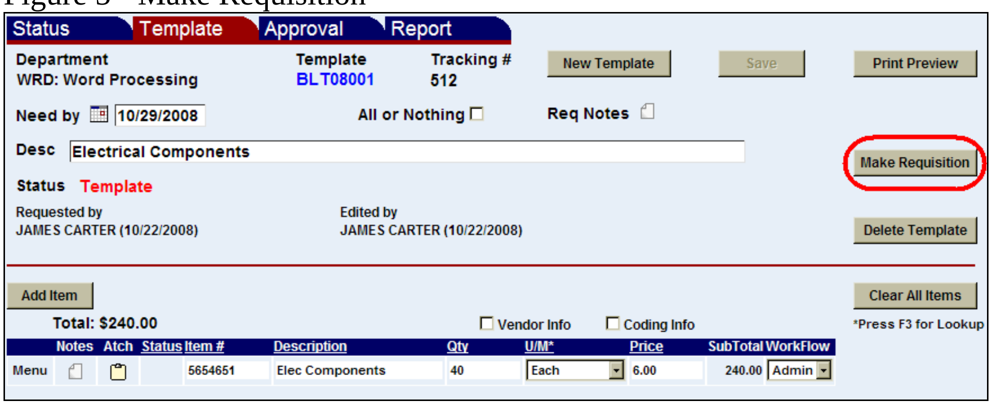
1. Select **Requisitions**.
2. Click the **Status** tab.
3. Check the **Template** check box.
4. Click **Find**.

Figure 4 - Template check box on teh Status screen



5. Locate the template to use and click **Edit**.
6. Click **Make Requisition**.

Figure 5 - Make Requisition



7. Enter (or change) the **Description** and make any necessary changes to the itemized list or add additional items.
8. If desired, click **Vendor Info** to add or change a vendor name and address.
9. If desired, click **Coding Info** to add or change the fiscal coding.
10. Click **Itemize Complete** (this will save the requisition and make it ready for approval) or click **Save** if you want to save the requisition and add to or change it later.